



The QuickBooks™ Client Newsletter

Helping You Grow a Profitable Business with QuickBooks™ Software

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Polish Your Image: Customize QuickBooks' Forms

The invoices and other forms you send to customers and vendors should reflect your company's attention to detail, accuracy, and consistency.

Every opportunity you have to interact with your customers and vendors is critical. Whether it's a phone call, an in-person connection, or an email, how you present yourself reveals a lot about you. Are you efficient? Friendly? Do you handle orders and problems and payment issues quickly and carefully?

Your accounting forms can also contribute to your image. They should always be:

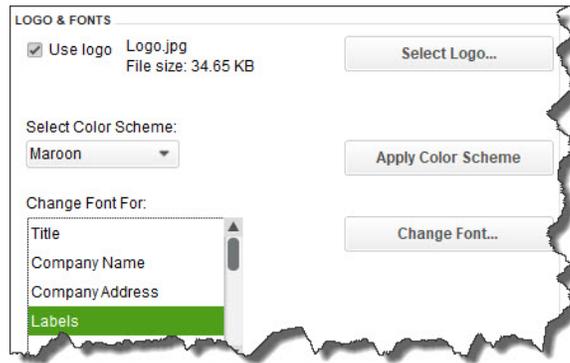
- Neat and attractive.
- Easy to read, with the most important information displayed prominently.
- Consistent with any graphics you use on other company materials.
- Accurate, above all.

You might be able to use at least some of QuickBooks' form templates as is, without any modifications. But couldn't they be better? More visually appealing? Formatted to include only the fields that your business most often needs? QuickBooks contains the customization tools you need to make them so.

Improving What Exists

We will now look at the modification options for an invoice. Depending on what version of QuickBooks you are using, you can also work with sales receipts, purchase orders, statements, estimates, sales orders, and credit memos.

- Start by opening the **Lists** menu and selecting **Templates**.
- Highlight **Intuit Product Invoice** in the list.
- Click the down arrow next to **Templates** in the lower left corner and choose **Edit Template**.



You can personalize your QuickBooks forms and make them consistent with any design themes your brand may use.

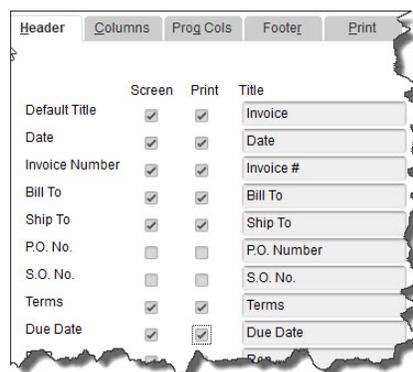
The above image displays part of the window that opens. Here, you can add a logo, change the color scheme, and change fonts for your company's contact information and the labels that identify each field (like **Bill To**, **Terms**, and **Quantity**). The right pane of this window shows you what the form will look like as you make changes.

Nothing you've done so far will prevent you from using Intuit's pre-printed forms. But when you click **Additional Customization** at the bottom of the screen, you'll be warned that if you make modifications beyond this point, the forms may not print correctly. To be safe, click **Make a Copy**. You'll be able to print this new version on plain paper.

Deeper Customization

The image below shows you part of the window that opens when you click on **Additional Customization**. The first two columns here are the most important; they let you specify the labeled fields that will appear on your invoices. When **Header** is the active column, you'll be able to choose the content that will go at the top of your form, like **Date**, **Invoice Number**, and **Terms**.

Next to each default label, you'll see boxes for **Screen** and **Print**. Click in these boxes to create or delete checkmarks; this will indicate whether each label will appear in the software itself and which will be printed for your customers to see. If you'd like to change the language QuickBooks uses to describe each, enter your preferred word or phrase in the **Title** column.



With the Header column highlighted, you can shape the appearance of the top section of your invoices.

Warning: As you are checking and unchecking boxes, a dialog box may open telling you that your changes will cause some fields to overlap on your form. If you click the *Default Layout* button, QuickBooks will make automatic adjustments to fix this. Clicking *Continue* means you'll have to use the software's *Layout Designer* to make your own adjustments. This tool is not particularly intuitive, and it requires some design skills. If you must work with the *Layout Designer*, let us help.

When you click the **Columns** tab, you'll see a list of the fields available for the main body of your invoices, like **Description**, **Quantity**, and **Rate**. This works similarly to how you just modified the **Header**, with one exception: You will be able to enter numbers in the **Order** column to specify the placement of each field. Here again, you will be able to watch a preview of your changes in the right pane of this window.

If you want to start over, click the **Default** button to revert the form to its original state. When you are done, click **OK**.

Neatness Counts

Whether you print and mail your forms or simply dispatch them electronically, we strongly encourage you to make them as professional and polished as you possibly can. Their appearance will enhance or detract from the image your customers and vendors have of your business. Let us know if we can help here. We'd be happy to help you learn about and implement the customization options that QuickBooks offers.

We hope you find this QuickBooks tip helpful. Please visit our company website <http://www.accountingconnections.org> often as it is updated constantly and offers a wealth of tax and accounting tips, along with links to better serve your business needs. Our QuickBooks Tips newsletters are archived on our website as well.

Accounting and Taxation is **our** business; having us a part of your team allows **you** to concentrate on **your** core business.



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Enrolled Agent (EA), Master of Accounting (MAcc), National Tax Practice Institute Fellowship (NTPF)
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*An **Enrolled Agent (EA)** is a federally licensed tax professional, who has taken an extensive test in taxation and must comply with continuing education in tax law to maintain their license.*

Enrolled Agents are allowed to represent clients before all administrative levels of IRS without their clients' presence (the same as a CPA).